# What's New in QuickDOC Ver. 2.1.1

# QuickDOC and QDPortal

**QuickDOC Version 2.1.1** is compatible with the latest **DOCLINE Version 1.5**, released in late February, 2003.  It properly recognizes the new placement and length of the **ISSN Field** (while retaining a check for the old position, so that earlier version capture files can be re-imported as needed), etc. Download information is always available at:  http://nnlm.gov/quickdoc/InstallQD.html

# QDPortal 1.0.7

A new version of QDPortal, Version 1.0.7, is now the latest version.  Download information is always available at:  http://nnlm.gov/quickdoc/InstallQDP.html. Changes in 1.0.7 are as follows:

## Automatic Print Menu no longer displays

Because the new version 1.5 of DOCLINE uses a different method to display **Receipts** (both regular and Loansome Doc) for printing (the Print Receipts button is delayed until all request data has been transferred to the browser, and the Receipts are no longer displayed in a different window), QDPortal can now use the **regular DOCLINE method for printing**.  After clicking the Acknowledge message, click the **DOCLINE Print Receipts button** to get to the Print Menu.

STOP
Stop Search

?
QDPortal Help | Exit QDPortal

Request Info for Incoming Requests Beginning with # 1884
Saved to: C:\QDLoan\QDPLData.txt

**DOCLINE®**  *interlibrary loan request routing and referral system*

NATIONAL LIBRARY OF MEDICINE

◇ REQUESTS   ◇ DOCUSER®   ◇ SERHOLD®   ▢ LD   ◇ HELP   ▢ HOME        Logoff-DEMO-MA(

Notice is always given, as above, when the data from the current Receipt file has been saved.

In QDPortal 1.0.7 and DOCLINE 1.5, the Print Menu will no longer arrive automatically. Use the 'Print Receipts' DOCLINE button, below, to bring it up when ready.

# *1884*

Request # 1884                                                                FEB 12, 200

Mail To:

Beth Israel Deaconess Medical Center – East
Agoos Medical Library ILL
330 Brookline Avenue
Boston, MA 02215

DOCLINE:   Journal   Copy   Epayment

Title:          Medical reference services quarterly.
Title Abbrev:   Med Ref Serv Q
Citation:       1991 Summer;10(2):11-32
Article:        QuickDOC: an interlibrary loan department in a mic

Print Receipts

Proceed as before once the Print Menu pops up.  Nothing is changed for printing on the Borrow side: right-click within the frame to get the context menu with the Print choice.


## *Popup Windows in QDPortal*

Popup windows, such as those that display the list of states/provinces in the SERHOLD search, have always been a special challenge in QDPortal.  When the browser  gets the notification to open the window, it wants to respond by opening a new instance of Internet Explorer.  Since this might lead us who-knows-where, QDPortal intercepts this message and opens its own window instead.  Not having any idea which window this might be, it just chooses a general size and hopes it will work.

Version 1.0.7 has enlarged this initial size a bit, added an attempt at trying to close those popups automatically (not an easy trick when you have to guess what went on in there), and added an Alt-C hot key to close the window from within.  The new popup window will appear as follows:
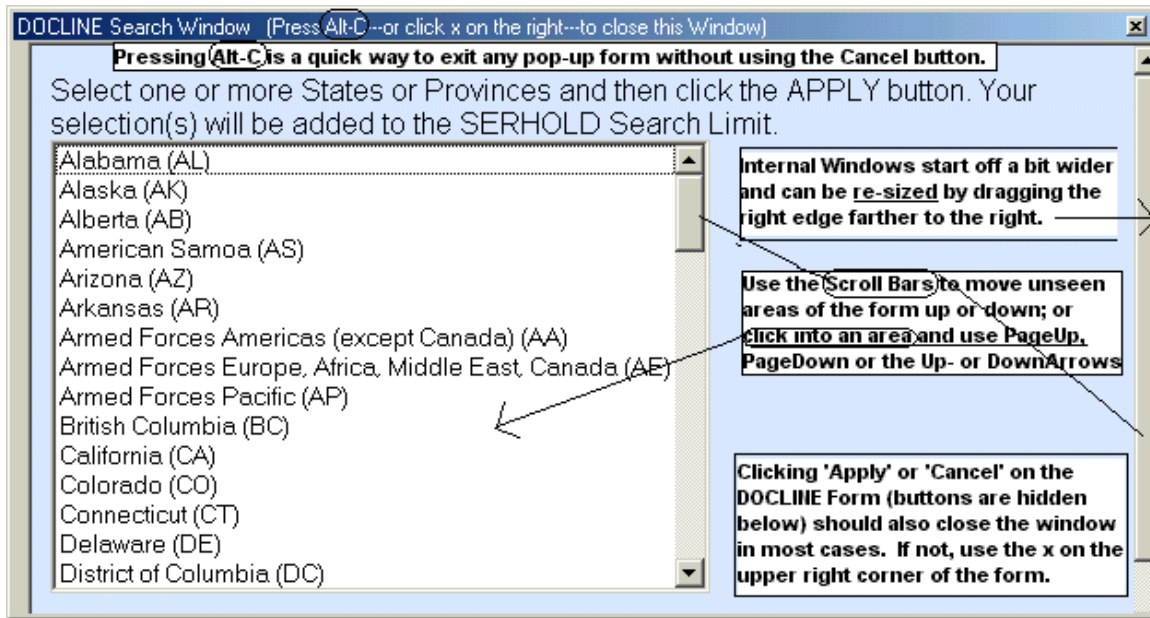
Alt-C only works when the focus is within the form, so you may have to click once into the white area before pressing the Alt-C combination, and it won't work, of course, after a DOCLINE Cancel button has been used, so there will continue to be, alas, many cases where you may need to use the x at the upper right to close the window.

Unlike earlier versions of QDPortal, in Version 1.0.7, when you click the Apply button, the popup window should close on its own (without your clicking the x at the upper right of the now-blank popup).

## If an error occurs after clicking the Apply button…

In most cases this new method will work just fine; the popup window will disappear after you click Apply, as it should. In cases where the processor on the computer is faster than QDPortal's ability to grab the fact that the Apply button has been clicked and to close the window on its own, however, you may get an Exception message that kicks you all the way out of QDPortal. On Windows9x machines it may appear as a **This program has performed an illegal operation** error, as follows:

DOCLINE Search Window   (Press Alt-C---or click x on the right---to close this Window)

Select one or more Library Groups and then click the APPLY button. Your selectio
(s) will be added to the SERHOLD Search Limit.

My Routing Table
ABSAUM  Association des Bibliotheques de la Sante Affiliees a l`Universite de Montreal
AFMLC  Air Force Medical Library Consortium
AHECCH  Charlotte, North Carolina AHEC
AHECNW  Wake AHEC
AHSLC  Atlanta Health Science Libraries Consortium
AMAHSL  Association of Memphis Area Health Science Libraries
AMEDD  Army Medical D
AMHL  Association of Me
APAL  Arkansas Primary
ARIHSL  Association of F
ASDESE  Association de

Apply   Reset   Canc

Q dportal

This program has performed an illegal operation and will be shut down.

If the problem persists, contact the program vendor.

Close
Debug
Details>>

In Windows NT the message may appear in a **Dr. Watson** window as **An application error has occurred** with the following format:

Dr. Watson for Windows NT

An application error has occurred
and an application error log is being generated.

May occur on NT machines after clicking Apply in a DOCLINE Popup Window.

QDPortal.exe

Go to Setup Screen and check the 'Suppress Auto-close' checkbox.

OK   Cancel   Help

In both cases, the workaround is the same:  There's a new checkbox on the Setup Screen form for **Suppress Auto-close on Apply in popups**.

Checking this box will tell QDPortal not to try to close those (primarily SERHOLD) popup boxes after an Apply button is clicked, but to display the empty window and wait for a click on the x at the upper right.

## Patron List no longer overwrites QDPPats.txt on exit

Now that the Patrons List in QDPortal is managed by the Patrons Table in QuickDOC, it's no longer necessary to save it to disk on exiting QDPortal. Instead, any new Patrons created during a current session are saved both to the Listbox and at the end of the current QDPPats.txt file. This fixes the situation where, when both QuickDOC and QDPortal were open at the same time, changes to QDPPats.txt made by QuickDOC would be overwritten upon exiting QDPortal. This should no longer occur.

## Clicking yellow box at top center of QDPortal exposes Patron List

The **Patrons List**, as well as the various action buttons at the bottom of the QDPortal screen, should be revealed or hidden based on where you are in the course of creating Borrow Requests. In certain situations, though, such as when you initiate a **Back command** or use a **Return button** to continue with a list of PubMed citations, QDPortal may not recognize the sequence that usually causes the List and action buttons to be displayed. In such cases you can click once in the **yellow message box** at the top center of the screen to cause the Patrons List and action buttons to be shown again, no matter where you are in the course of creating the rquest:

This will cause the List and buttons to re-display.

# Libraries Table

## Suppress AutoUpdate EFTS Choice in Library record

In version 2.1.0 and earlier, once you indicated that your library was an EFTS user by checking **the EFTS Payment Supported checkbox** on the **Charges Tab** of **your** library record, QuickDOC would automatically change the EFTS value to Yes for any Library whose request comes in to you with an **Epayment** notation at the top.  The rationale here was that this would be a time-saver for newly-joining EFTS members: they could check their own checkbox and then have other EFTS members in effect update themselves during their next Receipt.

This caused problems, however, for Libraries who had special Billing arrangements with other libraries that were also EFTS members.  These records kept being changed back to **EFTS = Yes** when they wanted it kept at **EFTS = No**.  Version 2.1.1 now presents a Message Box choice when you change your own EFTS value to Yes:

Answering No here will **suppress that EFTS check for Library records on Receipt of a request marked Epayment**. Only **newly-created Library records** will automatically record the Library as EFTS = Yes if the first Receipt from that Library is an Epayment.

Most libraries will leave it as yes, but if you want to suppress this update, and your library record already has the EFTS box checked, uncheck it and click Apply to first set yourself as EFTS = No, then check it and click Apply again to get the box above.

# Borrow Functions

## Patrons List now identifies Inactive Patrons

**Inactive Patrons** are no longer included in the Patron List that displays in **QDPortal** at the upper right of the screen during the DOCLINE session. On the Patrons List in the main QuickDOC program, they will be displayed, but with an [I] (for Inactive) at the beginning of the MI field to alert you to their status:
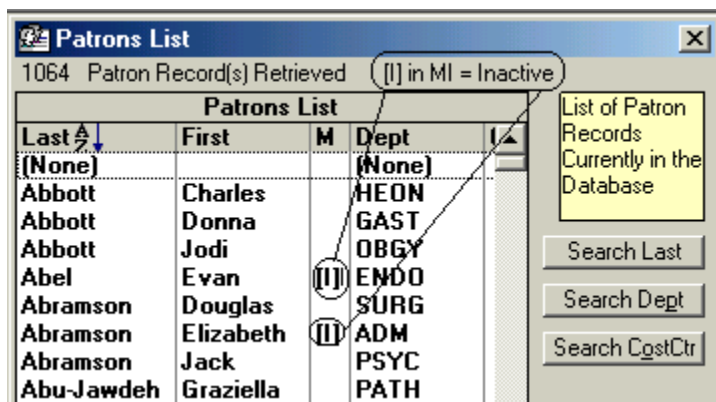


The **[I]** is actually included at the beginning of the **Middle Initial field** and is automatically added or removed when you change the Active status on the **Misc Tab** of the **Patron Information Form**. Consequently, it is possible to add it or remove it directly, but checking or unchecking the Active checkbox is the preferred method (since adding an [I] to the MI field won't actually change the Active value!). Because it's added at the beginning of the field, it preserves the actual Middle Initial, but only if that value is 3 characters or less, since the maximum length of that field is six characters.

### Deleting Patrons while retaining item Dept, Cost Center data

While using the Delete Patron button is the easiest way to delete a Patron, QuickDOC won't permit you to delete a Patron if that Patron record still has a related record in one or another of the QuickDOC.MDB tables. Nevertheless, you can delete a Patron with related table activity by using the **Transfer Activity button.**
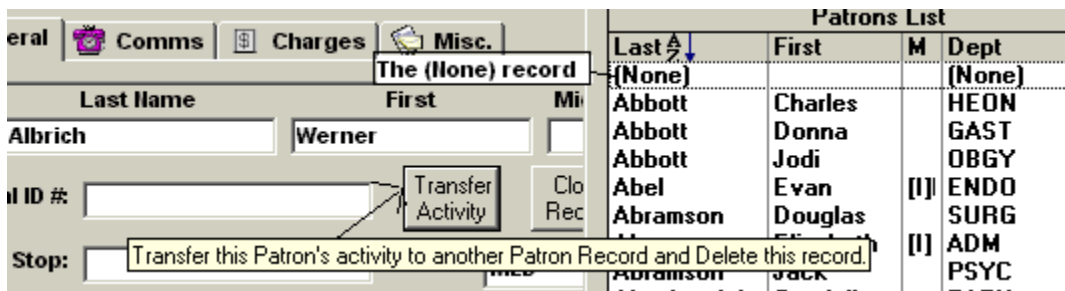
Click on the **(None)** record at the top of the list to transfer Patron activity and allow the Patron record to be deleted (which occurs as part of the process).

While the Transfer Activity button will do the job, changing the Patron referred to in a variety of Tables from the real Patron to the placeholder (None), which is the equivalent of a Blank Record, it's worth considering what might be lost.  First of all, there will be no Patron to refer to in future reports.  While the **Dept and Cost Center information for each request will remain** (which is a change in behavior starting in version 2.1.1), any Patron-related information (such as Patron Status or Suffix) will be unavailable for reporting purposes.  **Local Payment information** will also be transferred to the (None) Patron record, where it's aggregated with all the other (None) transfers.  And finally, **once this transfer is made, there is no easy way to reverse it**.

## *Requests Outstanding Grid*

### F4 Key now queues up Local Information as first sub-Grid choice

Clicking the + sign at the left of any row will bring up the underlying **Bibliographic** and **Local Item Information**.  Bibliographic Information is the initial default, but if you click that + sign two or three times, eventually you will uncover the Local Information Grid.

In order to make this process a bit more accessible, if you press the **F4 Key** before clicking the **+** sign, the default will be for Local Information rather than the Bibliographic.  This option only occurs if the focus is in the **RQNO cell**.  While this will be true in both the Requests Outstanding Grid and the Borrow Item Backfile Grid, it might be most useful in Requests Outstanding to indicate a **change in the Local Delivery Method** before the item is marked **Received**.  In the case below, the F4 key was pressed before the + sign (now a – sign) was clicked:



If you **change the Local Delivery Method**, this is a key for QuickDOC to **re-calculate the Local Patron and Dept Charges** (other keys are changes to **Rush** or to the **Lending Library**), so you may see changes there as well:

**All Requests Outstanding - By Request Number**

| | RQNO | Patron | Dept | Libr | Chrg | Year | Title | ItemType | ItemF | Sent | Rec | Status |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ 🗖 | 8945121 | Folcarell ▾ | NURS | NHUNSJ ▾ | $0.00 | 1988 | J professional nu | Journal | Copy | 1/3/2003 | | Outsta |
| | RQNO | ChgAsPat | Dept | ChgAsDe | CostCtr | | Item | LocalDel | Rush | LocalStat | | Outsta |
| | ✎ 8945121 | $5.00 | NURS | $5.00 | | | 1988 J profes | Email ( ▾ | No | Open | | Outsta |
| ◀ | | | | | | | | | | ▾ | | Outsta |
| ☐ ⊕ | 1591 | Chg is re-calculated after Del Meth change, but will be re-calculated again when Status = Received. | | | | | | | | | | Outsta |

In the case above, since the Status is still Outstanding, the charges will be re-calculated again when the item is **checked in** (**marked Received**).  If there is no other change in Rush or Library or Delivery Method, though, the charges re-calculated then will be the same as those above.

After an item has been invoiced or paid, however, all changes to **ChrgAsPatron** and **ChrgAsDept** will be ignored, as a practical matter, since the **final Local Charge is assigned at the time the Local Status is changed to Invoiced or Paid** (Patron or Department).  In order to re-calculate, you must first change the **Local Status** back to **Open** (which usually means deleting an Invoice or Payment assigned to it) and then re-do the payment or invoice.

## Copyright Check added in Requests Outstanding Grid

**For libraries located in the U.S.** the Requests Outstanding Grid will highlight in red items where the Journal has already been borrowed **5 or more times during the current year**.  This count **will exclude items where the year of publication is earlier than 5 years before the current year**, but it won't consult the CCL or CCG status, so it should be considered a 'heads up' rather than a final report.

**All Requests Outstanding - By Request Number**

| | RQNO | Patron | Dept | Libr | Chrg | Year | Title | ItemType | ItemF | Sent | Rec | Status | DelM |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ⊕ | 6550330 | Trobaug ▾ | HEMON | OHUCHE ▾ | $0.00 | 1999 | Leukemia lymph | Journal | Copy | 4/10/2002 | | Outsta | Mail |
| ⊕ | 6550332 | Trobaug ▾ | HEMON | OHUCHE ▾ | $0.00 | 2000 | Cancer genetics | Journal | Copy | 4/10/2002 | | Outsta | Mail |
| ⊕ | 6550334 | Trobaug ▾ | HEMON | OHUCHE ▾ | $0.00 | 1999 | Leukemia lymph | Journal | Copy | 4/10/2002 | | Outsta | Mail |
| ⊕ | 6550335 | Trobaug ▾ | HEMON | TNUTSJ ▾ | $10.00 | 1999 | Leukemia resear | Journal | Copy | 4/10/2002 | | Outsta | Mail |
| ⊕ | 6550446 | Aubrech ▾ | (None) | TXUDTS ▾ | $0.00 | 1999 | J spinal disorder | Journal | Copy | 4/10/2002 | | Outsta | Mail |
| ⊕ | 6569138 | Trobaug ▾ | HEMON | OHUCHE ▾ | $0.00 | 1999 | Leukemia lymph | Journal | Copy | 4/11/2002 | | Outsta | Mail |
| ⊕ | 6569139 | Trobaug ▾ | HEMON | ILUCMH ▾ | $0.00 | 2000 | Biology of blood | Journal | Copy | 4/11/2002 | | Outsta | Mail |
| ⊕ | O641382 | Liang ▾ | 7370 | COUCOL ▾ | $8.00 | 1992 | Histopathology o | Monograp | Origina | 4/11/2002 | | Outsta | Mail |

This information can be used to cancel and re-direct an item to a lender that includes Copyright payment in the fee, or to add an extra royalty charge to the Patron Charge after the item is checked in.

For **libraries located outside the U.S.** the Requests Outstanding Grid will highlight in red items where the Journal has already been borrowed **10 or more times during the current year**, no matter what the year of publication.

## Journal Times Borrowed Column in Requests Outstanding Grid

The number of times borrowed is always available in the Requests Outstanding Grid by selecting **Show All Grid Cols** from the context menu that appears when you left-click the header of any column.  Scroll to the far right to view the column (the header will be the current year + "Borr").

| ItemType | ItemF | Sent | Rec | Paid On | Status | DelM | Rus | MaxC | LocalS | SRCE | Note | 2002Borr |
|----------|-------|------|-----|---------|--------|------|-----|------|--------|------|------|----------|
| Journal | Copy | 4/10/2002 | | | Outsta | Mail | No | $12.0 | Open | DOCLINE | | 5 |
| Journal | Copy | 4/10/2002 | | | Outsta | Mail | No | $12.0 | Open | DOCLINE | | 1 |
| Journal | Copy | 4/10/2002 | | | Outsta | Mail | No | $12.0 | Open | DOCLINE | | 5 |
| Journal | Copy | 4/10/2002 | | | Outsta | Mail | No | $12.0 | Open | DOCLINE | | 0 |
| Journal | Copy | 4/10/2002 | | | Outsta | Mail | No | $12.0 | Open | DOCLINE | | 1 |
| Journal | Copy | 4/11/2002 | | | Outsta | Mail | No | $12.0 | Open | DOCLINE | | 5 |
| Journal | Copy | 4/11/2002 | | | Outsta | Mail | No | $12.0 | Open | DOCLINE | | 0 |
| Monograp | Origina | 4/11/2002 | | | Outsta | Mail | No | $8.00 | Open | OCLC | | 0 |

If you click on the header of that column you can Sort Descending to put the most borrowed titles at the top.  Again, these numbers reflect **CONTU Guidelines** values in the U.S. (only publication dates within the previous five years) and all dates outside the U.S.

For complete Copyright information, use the Copyright Report (All Items) to check/edit CCL and CCG values; then use the Copyright Report (U.S. – CCC) to file with the Copyright Clearance Center.

## Quick Report for Journal Times Borrowed

While the Requests Outstanding Grid will highlight items borrowed 5 or more times, it doesn't show detail on the number of times the title was borrowed.  To have a quick look at all Borrow transactions for any title, just click into the Title cell in **either the Requests Outstanding or Borrow Items Backfile Grid**, which will expose a **Quick Jrnl Rpt button**.  Click this button (or press **<Alt><Q>** on the keyboard) to see a list of all times the Journal Title was borrowed since the beginning of the year.



The Print Preview screen will display the list (the dates Jan 1 to Date are built into this report):

Preview

Print Page  Expand Page  Close

Report for one Journal Title only will usually fit on one page.

*Report for [Curr topics in medicinal chemistry.] in 2003, sorted by Pub Year (Descending).*
01-Jan-03 to 28-Jan-03

28-Jan-2003                    Beth Israel Deaconess Medical Center (01-Jan-03 to 28-Jan-03)                    Page 1
Journal#        # Borrowed    Lender      Year  Jrnl Title                                      Patron
   1                1         MDUNLM      2002  Curr topics in medicinal chemistry.   Jun;2(6):507-28   Sukhatme, Vikas

TOTAL ALL ITEMS: 1         Quick Reports are current year only and can be printed with the Print Page button

This is basically a short version of the Journals Borrowed (Full) Report.  If you want a printout, click the
**Print Page menu choice**.  The printout is basically a screen shot of the top half of the report.



Print Page will give you a screen shot, for the most part, of the top half of the full screen.  Use the full reports for true page-length printouts.

Quick Reports for Journals are always based on the current year.

*Report for [Curr topics in medicinal chemistry.] in 2003, sorted by Pub Year (Descending).*
01-Jan-03 to 27-Jan-03

Quick Reports are for 1 Journal, etc.

27-Jan-2003                    Beth Israel Deaconess Medical Center (01-Jan-03 to 27-Jan-03)                    Page 1
Journal#        # Borrowed    Lender      Year  Jrnl Title                                      Patron
   1                1         MDUNLM      2002  Curr topics in medicinal chemistry.   Jun;2(6):507-28   Sukhatme, Vikas

TOTAL ALL ITEMS: 1

Because of the way this is set up,  it will only print as much of the report as shows on top of the horizontal
scroll bar at the bottom, but this should be sufficient for most shorter lists.  As a convenience, I've left the
Print Page menu choice in most of the Print Preview screens, albeit with an added **[Top Half Only]** note.


## *Borrow Item Backfile Grid*

As in the Requests Outstanding Grid, if you press the **F4 Key** before clicking the **+** sign while the focus is
in the **RQNO cell**, the default will be for Local Information rather than the Bibliographic.

## PaidIFM Status choice added in Borrow

In addition to PaidLender and PaidEFTS, a **PaidIFM** Status has been added.  It replaces the previous **Invoiced** Status, which had no real use in the Borrow Backfile Grid, since receipt of an Invoice from a Lender would most likely move directly to PaidLender, rather than an interim status of Invoiced.  If, by chance, anyone has used that old Invoiced status on the Borrow Grid (Invoiced in Lend, of course, will remain, since these will be your invoices, not another library's), you might want to change that to either PaidLender or Received before updating to 2.1.1.

If your own Library record indicates that you participate in EFTS or OCLC's IFM system, you will be asked, each time you mark an item as Paid by clicking the **Record Selector** and **Mark Paid** buttons, whether this payment is an **EFTS Payment** or **IFM payment**:
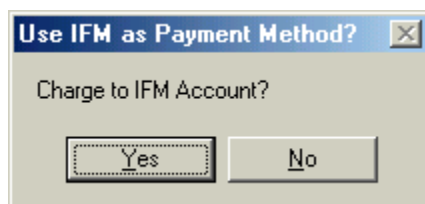


If it is either, you will also see an input box for entering a **Payment Note** similar to those on regular Payment forms.

## *Local Billing Grid*

## Show ALL (even 0.00) Items in Local Billing Grid

In the Local Billing Grid, **No Charge (0.00) Items** are usually **excluded** in the records retrieved.  Items must have a charge in either **CHRGAsPatron**, **CHRGAsDept** or **LocalCHRG** to appear in the Grid.  In some cases, though, you may want to see ALL of a Patron's or Department's items for a certain period, to be sure that all items for which a charge should apply were actually charged as specified.

You can cause the Local Billing Grid to **show FREE items as well as charged items** by checking the **Also Show 0.00 Items checkbox**.



The same search, run with the checkbox unchecked, would have retrieved no items for Patron Eberhart.

## *Local Invoices*

## HTML Invoice option for Electronic Patron/Dept Billing

At the time Patron or Department Invoices are printed each month, you can opt to save a copy of each Invoice as an HTML file. These HTML versions of the **Patron**, **Department** or **Cost Center Invoice** can be forwarded as an email attachment to Patrons and Departments you wish to bill electronically. To save an HTML version of an Invoice run, check the **Also save each Invoice as an HTML file** checkbox on the Borrow Reports form after choosing an Invoice Report. Invoices printed, or reprinted, from the Local Billing Grid will also provide a prompt for this save.



If this box is checked, a copy of each invoice will be saved in the **Export folder** that always exists just beneath the location of the QuickDOC.MDB database. All **Patron Invoice HTML files** will be in the format **PInv####** (where #### is the actual four-digit invoice number), e.g., PInv1234. All **Department Invoice HTML files** will be in the format **DInv####** (where #### is the actual four-digit invoice number), e.g., DInv1234. All **Cost Center Report/Invoice HTML files** will be in the format **CInv####** (where #### is the actual four-digit invoice number), e.g., CInv1234.

Since these files aren't created during Print Preview, it will be necessary to print at least one copy of the invoice in order to have the file generated. Once the files are made, you can use the printouts to identify the files to send as email attachments. They will all be together in the Export folder:

These **HTML Invoice files will be deleted when an Invoice is deleted**, and also **when an Invoice is paid**, but it will be useful to clean these files out from time to time to prevent clutter. If you delete an HTML Invoice file that you later want to resend, you can **recreate it by running a Reprint of the original Invoice**.

**HTML Invoices** are quite similar to printed Invoices and will be displayed in whatever might be the default Browser of whoever clicks on the file icon. Displayed in Internet Explorer it looks as follows:



On Invoices printed or Reprinted from the Local Billing Grid, you are asked before each Invoice is printed whether you also want an **HTML Invoice file save**d:

This question will appear before each print or reprint; just press **N** to dismiss it without saving as HTML, or Enter to save a copy.  Unused copies won't hurt anything, but will require cleaning out that Export folder from time to time.  At some point I hope to have some general profile for suppressing this box for those who will never print an HTML Invoice, but for now just press **N** here and keep the **HTML checkbox** unchecked in the batch Invoice prints.

There's also a new **Report of Patron (or Dept) Invoices Outstanding**; see the Borrow Reports section, below, for a description.

## *Local Charge Profiles*

### 'Other' Surcharge is Automatically Applied to Each Item

 [The **Other Surcharge** field in the Local Charge Profiles table is used to apply **a standard surcharge on any request**, over and above the charge computed from the other columns.  In reality, it is only used in cases where the **Use Cost As Base box** is checked and you want to add another standard charge to whatever it is that you paid for it.  Otherwise, it's just as easy to put the extra charge in Base Charge, which is also applied against each item.  Like the Rush and Fax surcharges, the Other Surcharge will not be applied on any item within the number of free items specified.]

### Default Local Charge now set on the Local Charge Profile Form

A checkbox has been added to the form to permit setting the **Local Default Charge Profile**, which is the profile that will be applied to any newly created Patrons or Departments.  To set the default, just choose the Profile you want from the list (by clicking on it so that its values populate the boxes to the left of the list), click the checkbox, and then click Apply (to register the change and continue editing) or Ok (to register the change and exit the form).  The Local Charge Profile form now appears as follows:

**Local Charge Profile Information**

Charge Profile Name: `5 Default`

Base Charge: $ `5.00`

☐ Use Cost as Base Charge

Fax Surcharge: $ `0.00`

Rush Surcharge: $ `0.00`

Other Surcharge: $ `0.00`

Per Page Surcharge: $ `0.00`

#Free Items Before Chrg Begins: `0`

☑ Use this as the Default Local Charge Profile

Notes: `Add variable Rush Charge when necessary.`

**Local Charge Profiles**

| Name | Base$ | UseCost | FaxSur | RushSur | OthSur | PerPage | FreeItems | Notes |
|------|-------|---------|--------|---------|--------|---------|-----------|-------|
| 10c/pg | $0.00 | No | $0.00 | $0.00 | $0.00 | $0.10 | 0 | 10 cents per |
| 11 Default | $11.00 | No | $0.00 | $0.00 | $0.00 | $0.00 | 0 | Default Char |
| 20 Free | $0.00 | No | $0.00 | $0.00 | $0.00 | $0.00 | 20 | 20 Items Fre |
| 5 Default | $5.00 | No | $0.00 | $0.00 | $0.00 | $0.00 | 0 | Add variable |
| Cost of Requ | $0.00 | Yes | $0.00 | $0.00 | $5.00 | $0.00 | 0 | Charge is Co |
| Free | $0.00 | No | $0.00 | $0.00 | $0.00 | $0.00 | 0 | Hold for No ( |
| Loansome Dc | $5.00 | No | $0.00 | $0.00 | $0.00 | $0.00 | 0 | This the prof |

If there's a per page charge, it's added to the base charge.

In a Cost of Request profile, this charge is added to whatever was the Library charge.

Enter a Charge Profile Name for this Profile, or click on a profile from the list above to edit. <F5> = Clear Field.

[ OK ]  [ Apply ]  [ Exit ]  [ Delete Profile ]

Check this box to make this profile the default for new Patrons and Departments.

[ Clear Form ]

7  Local Profile Record(s) Retrieved   Click Clear to create new profile

To change the default, just bring up another profile and check the checkbox on that one. Since there can only be one default at a time, checking the box on one profile effectively unchecks it for all the others.

The Default Library Charge Profile is still set on the **General Setup Form**.

# Lend Functions

## Lend Grids

### Quick Report of Journal Times Loaned

To have a quick look at all Lend transactions for any title, just click into the Title cell in any Lend Grid to expose a **Quick Jrnl Rpt button**. Click this button (or press **<Alt><Q>** on the keyboard) to see a list of all times the Journal Title was loaded since the beginning of the year.

## Library Billing Grid

### Show ALL (even 0.00) Items in the Library Billing Grid

In the Library Billing Grid, **No Charge (0.00) Items** are usually **excluded** in the records retrieved. Items must have a charge assigned in order to appear in the Grid. In some cases, though, you may want to see ALL of a Library's items for a certain period, to be sure that all items for which a charge should apply were actually charged as specified.

You can cause the Library Billing Grid to **show FREE items as well as charged items** by checking the **Also Show 0.00 Items checkbox**.

The same search, run with the checkbox unchecked, would have retrieved only 21 items for COUCOL.

## *Library Invoices*

### HTML Invoice option for Electronic Library Billing

At the time Library Invoices are printed each month, you can opt to save a copy of each Invoice as an HTML file.  These HTML versions of the Library Invoice can be forwarded as an email attachment to Libraries you wish to bill electronically.  To save an HTML version of an Invoice run, check the **Also save each Invoice as an HTML file** checkbox on the Lend Reports form after choosing an Invoice Report.  Invoices printed, or reprinted, from the Library Billing Grid will also provide a prompt for this save.

If this box is checked, a copy of each invoice will be saved in the **Export folder** that always exists just beneath the location of the QuickDOC.MDB database. All **Library Invoice HTML files** will be in the format **LInv####** (where #### is the actual four-digit invoice number), e.g., LInv1234.

Since these files aren't created during Print Preview, it will be necessary to print at least one copy of the invoice in order to have the file generated. Once the files are made, you can use the printouts to identify the files to send as email attachments. They will all be together in the Export folder:



These **HTML Invoice files will be deleted when an Invoice is deleted**, and also **when an Invoice is paid**, but it will be useful to clean these files out from time to time to prevent clutter. If you delete an HTML Invoice file that you later want to resend, you can **recreate it by running a Reprint of the original Invoice**.

**HTML Invoices** are quite similar to printed Invoices and will be displayed in whatever might be the default Browser of whoever clicks on the file icon. Displayed in Internet Explorer it looks as follows:

The HTML Invoice looks similar to the printed version, but with a real email link and somewhat more white space.

# Invoice

## 01-Aug-02 to 03-Feb-03

3-Feb-2003          **Invoice Number: MAUZSL 0008**          Page 1

Make Check Payable To: Agoos Medical Library          Terms: NET 30
Beth Israel Deaconess Medical Center          Tel: 617.667-4225
Agoos Medical Library          Fax: 617.667-7197
330 Brookline Ave.          asilver@caregroup.harvard.edu
Boston, MA 02015

Cost Center: 108266

Include copy of Invoice or Inv No. with payment

Dana-Farber Cancer Institute
Baruj Benacerraf Library
44 Binney Street
Boston, MA 02115-6084

There are no page breaks in an HTML Invoice, since the recipient can scroll down to check, and his/her browser will make page breaks on printouts.

The title, Citation and Patron fields are a bit more truncated in HTML.

**Invoice Total: $3.00**

| Req No. | Year Title | Citation | Patron | Charge | Date Filled |
|---------|-----------|----------|--------|--------|-------------|
| 8980094 | 2001 J gerontological nursing | Sep;27(9):38-46 | Spain, Da | $3.00 | 06-Dec-02 |

On Invoices printed or Reprinted from the Library Billing Grid, you are asked before each Invoice is printed whether you also want an **HTML Invoice file save**d:



This question will appear before each print or reprint; just press **N** to dismiss it without saving as HTML, or Enter to save a copy.  Unused copies won't hurt anything, but will require cleaning out that Export folder from time to time.  At some point I hope to have some general profile for suppressing this box for those who will never print an HTML Invoice, but for now just press **N** here and keep the **HTML checkbox** unchecked in the batch Invoice prints.

There's also a new **Report of Invoices Outstanding**; see the Lend Reports section, below, for a description.

# *QuickDOC Reports*

## *Borrow Reports*

### Detailed Borrow Report now includes List of Library Groups

The first line of each Library's activity includes a **list of the Library Groups** to which that Library belongs. The format is as follows:



Library's Group memberships appear on the first line of each listing.

Detailed Borrow Report (by Library)
01-Jan-01 to 31-Dec-01

| | | | | | | |
|---|---|---|---|---|---|---|
| 19-Apr-2002 | | | Beth Israel Deaconess Medical Center (01-Jan-01 to 31-Dec-01) | | | Page 1 |
| Item | Lender | ReqNo | Date | Title | Citation | Charge |
| | ALUALA is a member of Library Group: OUT | | | | | |
| 1 | ALUALA | 1733495 | 31-Jan-01 | 1999 Clinical transplantation | Oct;13(5):365-74 | $0.00 |
| 2 | ALUALA | 1662560 | 31-Jan-01 | 1984 Peptides | Nov-Dec;5(6):1077-84 | $0.00 |
| 3 | ALUALA | 1919657 | 31-Jan-01 | 1999 Int J STD AIDS | Mar;10(3):174-81 | $0.00 |
| 4 | ALUALA | 1783206 | 31-Jan-01 | 1999 Canadian family physician Médecin d | Feb;45:373-9 | $0.00 |
| 5 | ALUALA | 1919658 | 31-Jan-01 | 1998 Int J STD AIDS | Mar;9(3):139-45 | $0.00 |
| 6 | ALUALA | 1684784 | 31-Jan-01 | 1995 NIDA research monograph | 150:92-109 | $0.00 |
| 7 | ALUALA | 1733520 | 31-Jan-01 | 1999 Clinical chemistry | Jul;45(7):934-41 | $0.00 |
| 8 | ALUALA | 1957801 | 31-Jan-01 | 1999 Surgical radiologic anatomy | 21(1):17-21 | $0.00 |
| 9 | ALUALA | 1884927 | 31-Jan-01 | 1999 Am J Chinese medicine | 27(3-4):299-305 | $0.00 |
| 10 | ALUALA | 2004533 | 28-Feb-01 | 1973 Zhonghua yi xue za zhi | 9():532-535 | $0.00 |
| 11 | ALUALA | 1996861 | 28-Feb-01 | 1999 Eye (London, England) | Dec;13 ( Pt 6):797-8 | $0.00 |
| 12 | ALUALA | 2003927 | 28-Feb-01 | 1993 J paediatrics child health | Aug;29(4):295-7 | $0.00 |
| 13 | ALUALA | 2130749 | 28-Feb-01 | 2000 Clinical J pain | Jun;16(2 Suppl):S67-72 | $0.00 |
| 14 | ALUALA | 2252953 | 28-Feb-01 | 1997 Indian J pathology microbiology | Jan;40(1):71-4 | $0.00 |
| 15 | ALUALA | 2211613 | 28-Feb-01 | 1999 Revue neurologique | 155(9):731-6 | $0.00 |
| 16 | ALUALA | 2058548 | 28-Feb-01 | 1999 Anaesthesia | May;54(5):461-5 | $0.00 |

## Summary Borrow Report now includes Library Groups

The Summary Borrow Report now includes Library Group assignments in parentheses, if any groups are assigned to that library:



Summary Borrow Report (by Library)
01-Jan-02 to 31-Dec-02

| | | | | | |
|---|---|---|---|---|---|
| 7-Jan-2003 | | Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Dec-02) | | | Page 1 |
| Library No. | Lender's LIBID | | Items Borrowed | Charge | Lib # |
| 1 | AZUARI | University Of Arizona | 1 | $11.00 | 1 |
| 2 | CAUCLA | University Of California, Los Angeles | 1 | $11.00 | 2 |
| 3 | CAUCSF | University Of California San Francisco | 1 | $11.00 | 3 |
| 4 | CAULVI | St Vincent Medical Center (OUT$) | 1 | $8.00 | 4 |
| 5 | CTUCON | Uconn Health Ctr/L M Stowe Library (R8$) | 9 | $110.00 | 5 |
| 6 | CTUHHH | Hartford Hospital (R8) | 1 | $0.00 | 6 |
| 7 | CTUYAL | Yale University (R8$) | 3 | $33.00 | 7 |
| 8 | FLUMIA | University Of Miami School Of Medicine | 1 | $11.00 | 8 |
| 9 | GAUMUD | Mercer University Atlanta | 1 | $10.00 | 9 |
| 10 | KYULOU | Kornhauser Health Sciences Library | 1 | $10.00 | 10 |
| 11 | MAUBHA | Brockton Hospital (CELL5, MA) | 3 | $0.00 | 11 |

Library Groups appear in parentheses, if there are groups assigned to that library.

## New Detailed Borrow Report (by Patron)

The **Detailed Patron Report** includes a line for each Patron transaction during the period specified. It includes not just ILL activity, but also Copy Service and LOANSOME DOC requests that were filled in-house, so the totals here may be higher than reports for the same period that track only ILL activity. The report is sorted by Patron Name (Last, First), and by Rec'd Date within each Patron. It includes the Patron Status in parentheses after each Patron Name, and indicates the Dept referenced for each transaction.

Charges are those Local Charges that are **billed to the Patron**. If the item was billed to a Department or Cost Center, or if the Local Charge, itself, was 0.00, then the **Charged As Patron** here will be 0.00.

**LOANSOME DOC** and **Copy Service** items are indicated by an **L** or a **C**, respectively, just to the right of the item number.

The format of the **Detailed Patron Re**port is as follows:



## New Summary Borrow Report (by Patron)

The **Summary Patron Report** includes a line for each Patron, along with the Dept and, in parentheses, the **Patron Status**. All transactions during the period specified are sorted by Patron Name, totals for each Patron are cumulated under **Items**; **Lending Library Charges** for each Patron are shown in the column **Chrg By Lender**; **Local Charges Paid By Dept or Cost Center** are shown in [**Dept Paid**], and actual **Local Charges Paid by Patron** are in the **Charged (as Patron)** column.

The report includes not just ILL activity, but also **Copy Service** and **LOANSOME DOC** requests that were filled in-house, so the totals here may be higher than reports for the same period that track only ILL activity. The **[LD]** and **[Cpy]** columns are subtotals of the Items column on that same line and are included in that item total. The [LD] column includes both in-house LOANSOME DOCs and those filled after referral on DOCLINE.

The Local Charges that were assigned to Departments or Cost Centers aren't included in the Charged (as Patron) Totals, but are shown [in brackets] here. The report is sorted by Patron Name (Last, First), and by Rec'd Date within each Patron. It includes the **Patron Status** in parentheses after each Patron Name, and indicates the **Dept** referenced for each transaction.

Charges are those Local Charges that are **billed to the Patron**. If the item was billed to a Department or Cost Center, or if the Local Charge, itself, was 0.00, then the **Charged As Patron** here will be 0.00.

The format of the **Summary Patron Report** is as follows:

# New Detailed Borrow Report (by Dept)

The **Detailed Dept Report** includes a line for each Dept transaction during the period specified. It includes not just ILL activity, but also Copy Service and LOANSOME DOC requests that were filled in-house, so the totals here may be higher than reports for the same period that track only ILL activity. The report is sorted by Dept Abbreviation and by Rec'd Date within each Dept. It includes the Full Department Name in parentheses after each Dept Abbreviaton, and indicates the Patron referenced for each transaction.

Charges are those Local Charges that are billed to this Department (or to a Cost Center of this Department). If the item was billed to a Patron, or if the Local Charge, itself, was 0.00, then the **Charged As Dept/ CostCtr** here will be 0.00.

**LOANSOME DOC** and **Copy Service** items are indicated by an **L** or a **C**, respectively, just to the right of the item number.

The format of the **Detailed Department Re**port is as follows:

## Detailed Borrow Report (by Dept)
### 01-Dec-02 to 31-Dec-02

24-Jan-2003     Beth Israel Deaconess Medical Center (01-Dec-02 to 31-Dec-02)     Page 1

| Item[LC]Dept/Patron | ReqNo | Date | Title | Citation | Charged As Dept/CostCtr |
|---|---|---|---|---|---|
| **MED (Dept Of Medicine)** | | | Copy service items show a C here | | |
| 1 C Tofias, Zachary | 8966402 | 05-Dec-02 | 1991 J medical ethics | Sep;17(3):138-43 | $0.00 |
| 2 Tofias, Zachary | 8994210 | 12-Dec-02 | 1986 Br medical J (Clinical research ed. | Mar 1;292(6520):596-8 | $0.00 |
| 3 Tofias, Zachary | 8966401 | 12-Dec-02 | 1984 J medical ethics | Mar;10(1):27-8 | $0.00 |
| 4 Tofias, Zachary | 8966399 | 12-Dec-02 | 1986 Br medical J (Clinical research ed. | Mar 1;292(6520):596-8 | $0.00 |
| **Total 4 Items For MED** | | | | **Total Charged to MED:** | **$0.00** |
| | | | | | |
| **NEPH** | | | | | |
| 1 Sukhatme, Vikas | 9038644 | 13-Dec-02 | 1990 Cardiovascular drugs therapy / spon | Jan;4 Suppl 1():37-43 | $0.00 |
| 2 Sukhatme, Vikas | 9038645 | 19-Dec-02 | 2002 Curr topics in medicinal chemistry. | Jun;2(6):507-28 | $0.00 |
| **Total 2 Items For NEPH** | | | Subtotals for each Dept. | **Total Charged to NEPH:** | **$0.00** |
| | | | | | |
| **NURS (Nursing Adm.)** | | | | | |
| 1 Folcarelli, Pat | 8945123 | 10-Dec-02 | 1995 Int J nursing practice | Nov;1(1):68-9 | $0.00 |
| 2 Folcarelli, Pat | 8945122 | 10-Dec-02 | 1992 J professional nursing | Jul-Aug;8(4):202 | $0.00 |
| **Total 2 Items For NURS** | | | | **Total Charged to NURS:** | **$0.00** |
| | | | | | |
| **OBGY** | | | | | |
| 1 Richardson, Martha (9024475 | | 12-Dec-02 | 2001 Ultrasound in obstetrics gynecology | Mar;17(3):191-6 | $0.00 |
| 2 Richardson, Martha (9024476 | | 13-Dec-02 | 2001 J ultrasound in medicine | Oct;20(10):1065-9 | $0.00 |
| **Total 2 Items For OBGY** | | | | **Total Charged to OBGY:** | **$0.00** |
| | | | | | |
| **RAD** | | | LOANSOME DOC items show an L here | | |
| 1 L Odom, Claire | 8945055 | 04-Dec-02 | 2002 AJNR. Am J neuroradiology | Jun-Jul;23(6):995-1002 | $0.00 |
| **Total 1 Items For RAD** | | | | **Total Charged to RAD:** | **$0.00** |

Grand Totals, and L and C Totals, are below.

TOTAL ALL ITEMS: 11     TOTAL DEPTS: 5     TOTAL ALL CHARGES:    $0.00

[L = 1 LD item(s); C = 1 Copy Service item(s)]     [Includes ONLY Charges actually invoiced or paid by Dept/Cost Center]

# New Summary Borrow Report (by Dept)

The **Summary Dept Report** includes a line for each Dept and, in parentheses, the **Full Dept Name**, if any is registered for that Dept. All transactions during the period specified are sorted by Dept, totals for each Dept are cumulated under **Items**; Lending Library Charges for each Dept are shown in the column **Chrg By Lender**; Local Charges Paid By Patron are shown in [**Patron Paid**], and actual Local Charges Paid by Department are in the **Charged (as Dept)** column.

The report includes not just ILL activity, but also **Copy Service** and **LOANSOME DOC** requests that were filled in-house, so the totals here may be higher than reports for the same period that track only ILL activity. The **[LD]** and **[Cpy]** columns are subtotals of the Items column on that same line and are included in that item total. The [LD] column includes both in-house LOANSOME DOCs and those filled after referral on DOCLINE.

The Local Charges that were assigned to Patrons **aren't** included in the Charged (as Dept) Totals, but **are shown [in brackets]** under [**Patron Paid**] here. The report is sorted by Dept Abbreviation. It includes the **Full Dept Name** in parentheses after each Dept Name, and indicates the **Dept** referenced for each transaction.

Charges are those Local Charges that are billed to this Department (or to a Cost Center of this Department). If the item was billed to a Patron, or if the Local Charge, itself, was 0.00, then the **Charged As Dept/ CostCtr** here will be 0.00.

The format of the **Summary Department Department Re**port is as follows:

Summary Borrow Report (by Dept)
01-Dec-02 to 31-Dec-02

Report includes Dept Abbreviation and Full Dept Name (in parentheses), if assigned.

The LOANSOME DOC and Copy Service columns are subtotals of the items column

| Dept No. | Dept/Abbr. (Dept Full Name) | # Items | [LD] | [Cpy] | To Lender | [Patron Paid] | Chrg (as Dept) | Dep # |
|---|---|---|---|---|---|---|---|---|
| 1 | MED (Dept Of Medicine) | 4 | | [1] | $11.00 | [$20.00] | $0.00 | 1 |
| 2 | NEPH | 2 | | | $9.00 | [$10.00] | $0.00 | 2 |
| 3 | NURS (Nursing Adm.) | 2 | | | $9.00 | [$0.00] | $0.00 | 3 |
| 4 | OBGY | 2 | | | $0.00 | [$10.00] | $0.00 | 4 |
| 5 | RAD | 1 | [1] | | $0.00 | [$5.00] | $0.00 | 5 |

24-Jan-2003          Beth Israel Deaconess Medical Center (01-Dec-02 to 31-Dec-02)          Page 1

Totals for the (LD) (CpyServ) (Lib) and (Dept) cols
[1]   [1]   $29.00   [$45.00]

Charges included when Local Status = InvDep or PaidDp.

Grand Totals in the line below

TOTAL DEPTS: 5          TOTAL ITEMS: 11          TOTAL CHARGES:          $0.00
[Includes LD Filled In-House & Copy Service items]          [Includes ONLY Charges actually invoiced or paid by Dept/Cost Center]

## New sort order for Journals Borrowed (Full) Report (by times borrowed)

In versions 2.1.0 and earlier, this report was simply an itemized, alphabetical listing, by Journal Title, of all titles borrowed, with Patron and Lender information included. Version 2.1.1 reconfigures this report to rank the titles by times borrowed, and to restrict the report to only those titles borrowed more than a stipulated number of times.

The **Journals Borrowed (Full) Report** generates a list of ALL journals borrowed, not just those subject to Copyright, **sorted by # Borrows**, most to least. Within each Journal Title, items are **sorted by Patron Name**, so that items borrowed for a single patron will be grouped together. This report can also be configured to print only those titles with a certain number of times borrowed, so that only those titles you borrowed most often will be included.

## Now Print only Most Borrowed Journal Titles

An input box will pop up after you've selected the Journals Borrowed (Full) Report to ask at which number of Borrows you want to cut off the printout:



If you leave it at 0 (or enter 1) it will print all items. To see all journals borrowed five or more times during the year enter 5. The report will be printed with the most-borrowed titles first, down to the last title borrowed 5 or more times.

The format of the **Journals Borrowed (Full) Report** (with a cutoff of 5) is as follows:

## Journals Borrowed (Full)
### (Includes All Journals Borrowed at least 5 times, sorted by # of Borrows, then by Patron, with Lender Inf
01-Jan-02 to 31-Oct-02

23-Nov-2002         Beth Israel Deaconess Medical Center  (01-Jan-02 to 31-Oct-02)       Page 1

| Journal# | # Borrowed | Lender | Year | Jrnl Title | Patron |
|---|---|---|---|---|---|
| 1 | 1 | OHUCHE | 1996 | Leukemia lymphoma | Bassal, Mylene Angel |
|  | 2 | OHUCHE | 1997 |  | Bassal, Mylene Angel |
|  | 3 | OHUCHE | 2001 |  | Daly, Jay |
|  | 4 | OHUCHE | 1998 |  | Liang, Xayuan |
|  | 5 | NSCQHE | 1991 |  | Liang, Xayuan |
|  | 6 | OHUCHE | 1999 |  | Trobaugh, Angela |
|  | 7 | OHUCHE | 1999 |  | Trobaugh, Angela |
|  | 8 | OHUCHE | 1999 |  | Trobaugh, Angela |
| 2 | 1 | COUZAM | 1991 | Am J surgical pathology | Janik, Jr., Joe |
|  | 2 | COUDGC | 1999 |  | Liang, Xayuan |
|  | 3 | COUDGC | 2001 |  | Mierau, Gary |
|  | 4 | COUDGC | 2001 |  | Mierau, Gary |
|  | 5 | COUUFC | 2001 |  | Mierau, Gary |
|  | 6 | COUDGC | 1999 |  | O'Connor, Judith |
|  | 7 | COUDGC | 1985 |  | O'Connor, Judith |
| 3 | 1 | COULTR | 2001 | Am J hospice palliative care | English, Nancy |
|  | 2 | COULTR | 2001 |  | Pearson, Joanne |
|  | 3 | COULTR | 1999 |  | Pearson, Joanne |
|  | 4 | COUVHD | 1993 |  | Pearson, Joanne |
|  | 5 | COULTR | 2000 |  | Pearson, Joanne |
|  | 6 | COULTR | 2000 |  | Pearson, Joanne |

This report can be fairly lengthy, if you don't restrict it to most borrowed titles, with a line for each item loaned.  The individual numbers in the second column (**# Borrowed**) provide the subtotal for each Journal during the printout.  This report also includes a total at the end of the report:

23-Nov-2002         Beth Israel Deaconess Medical Center  (01-Jan-02 to 31-Oct-02)       Page 2

| Journal# | # Borrowed | Lender | Year | Jrnl Title | Patron |
|---|---|---|---|---|---|
| 9 | 2 | COUDGC | 2000 | Seminars in neurology | Riffe, Stacey |
|  | 3 | COUDGC | 2001 |  | Sokol, Ron |
|  | 4 | COUDMS | 2000 |  | Strunc, Michael |
|  | 5 | COUDGC | 2001 |  | White, Andrew |

**TOTAL ALL ITEMS: 53**          **TOTAL JRNLS:  9**

## New sort order for Copyright Report (All Items) (by times borrowed)

In versions 2.1.0 and earlier, this report was simply an itemized listing, by Journal Title, of all titles borrowed, with various Copyright information included.  Version 2.1.1 reconfigures this report to rank the titles by times borrowed, and to restrict the report to only those titles borrowed more than a stipulated number of times.

The **Copyright Report (All Items)** generates a list of **ALL** journals borrowed, not just those subject to Copyright, **sorted by # Borrows**, most to least.  It can also be told to print only those titles with a certain number of times borrowed, so that only those titles you borrowed most often will be included.  Because the purpose of this report is to provide a mechanism for **fine-tuning Copyright data** before preparing the official CCC Copyright Report, it also includes the Request Number and Date Received, to facilitate editing in the actual request, if necessary.  No Patron Information appears on this report, but it does appear on the Journals Borrowed (Full), which can also be printed in a Most-Borrowed to Least-Borrowed fashion.

## How to use All Items as a final check for Copyright Report (U.S. – CCC)

You can use the Copyright Report (All Items), which includes the Date Received in the right column, to perform a final check for intra-year borrows that should not be included in the official CCC Report.

The Copyright Report (US – CCC) includes # of **pages**, Year, Jrnl Title (ISSN), and the citation.  As the subtitle suggests, <u>only</u> those items not excluded by time or CCL or the **Rule of 5** will appear in the report. This is a conservative estimate, so that if your Start Date is anywhere in 2001 (for example, in a year beginning Jan 1, 2001), QuickDOC will assign the **CCL cutoff date** to the earliest it could have been (a report date of 1/1/2001 yields a cutoff date of December 31, 1995  ---  **Anything before that COULD <u>NOT</u> BE within the 5-year period**) and will include any items after that that meet the other criteria.  So the Publication Years within that constraint are 2000, 1999, 1998, 1997, 1996 (with 2001 included by definition, as it progresses).

Of course, this floating 5-Year period  will change during the year in question, so that something borrowed in January, 2001 will be properly included, while something else, borrowed at the end of the year, might be included in the total while it should have been excluded, instead.  In these cases, use the CCL Copyright value to exclude items that would otherwise be included in the official report.  These items can be excluded under CONTU because the publication date/month within year 5 (1996 in our test case above) is earlier than the date/month when the item was borrowed during this current year.

## Now Print only Most Borrowed Copyright Titles

An input box will pop up after you've selected the Copyright Report (All Items) to ask at which number of Borrows you want to cut off the printout:



If you leave it at 0 (or enter 1) it will print all items.  To see all journals borrowed five or more times during the year enter 5.  The report will be printed with the most-borrowed titles first, down to the last title borrowed 5 or more times.

## Copyright Report (All Items)

*(Includes All Journals Borrowed at least 5 times, sorted by # of borrows, with Request #, CC info and #Pgs)*

01-Jan-02 to 30-Sep-02

This report can be limited to Journals borrowed most often during this period.

| Journal# [Req#] | # Borrowed | CC | #Pgs | Year | Jrnl Title (ISSN) | Citation | Rec'd |
|---|---|---|---|---|---|---|---|
| 1 [5820290] | 1 | G | 9 | 2001 | Am J hospice palliative care (1049-9091) | May-Jun;18(3):161-9 | 11-Feb-02 |
| [5683631] | 2 | G | 13 | 2001 | | Mar-Apr;18(2):89-101 | 31-Jan-02 |
| [5683481] | 3 | G | 8 | 2000 | | Mar-Apr;17(2):127-34 | 31-Jan-02 |
| [5683408] | 4 | G | 2 | 2000 | | Mar-Apr;17(2):76-7 | 31-Jan-02 |
| [5683628] | 5 | G | 10 | 1999 | | May-Jun;16(3):517-26 | 31-Jan-02 |
| [5820361] | 6 | G | 8 | 1994 | | Jan-Feb;11(1):26-33 | 11-Feb-02 |
| [5683486] | 7 | G | 2 | 1993 | | Jan-Feb;10(1):13-4 | 31-Jan-02 |
| 2 [5839360] | 1 | G | 6 | 2001 | Am J surgical pathology (0147-5185) | Oct;25(10):1231-6 | 13-Feb-02 |
| [5839359] | 2 | G | 9 | 2001 | | Oct;25(10):1252-60 | 13-Feb-02 |
| [5839358] | 3 | G | 5 | 2001 | | Dec;25(12):1551-5 | 13-Feb-02 |
| [6126425] | 4 | G | 10 | 1999 | | Jan;23(1):49-58 | 07-Mar-02 |
| [6126342] | 5 | G | 7 | 1999 | | Apr;23(4):390-6 | 07-Mar-02 |
| [6400464] | 6 | G | 9 | 1991 | | May;15(5):466-74 | 29-Mar-02 |
| [6059336] | 7 | G | 5 | 1985 | | Jul;9(7):475-9 | 28-Feb-02 |
| 3 [6470293] | 1 | G | 7 | 2001 | Br J haematology (0007-1048) | Nov;115(2):334-40 | 08-Apr-02 |
| [6445854] | 2 | G | 1 | 2000 | | Dec;111(3):717 | 02-Apr-02 |
| [5768497] | 3 | G | 13 | 2000 | | Dec;111(4):1010-22 | 05-Feb-02 |
| [5498015] | 4 | G | 7 | 2000 | | Mar;108(4):689-95 | 31-Jan-02 |
| [5768498] | 5 | G | 2 | 1999 | | May;105(2):569-70 | 05-Feb-02 |
| [5794729] | 6 | G | 4 | 1996 | | Mar;92(4):937-40 | 05-Feb-02 |

Use it to check that the CC value is correct, or that the pages are correctly calculated, or that (for US Libraries) the time between Rec'd and Citation is or is not 5 years. The Req# field is there to make editing easier.

This report will also total items, journals and pages at the end:

| Journal# [Req#] | # Borrowed | CC | #Pgs | Year | Jrnl Title (ISSN) | Citation | Rec'd |
|---|---|---|---|---|---|---|---|
| 9 [5412620] | 4 | G | 8 | 2000 | Seminars in neurology (0271-8235) | 20(2):225-32 | 25-Jan-02 |
| [5427061] | 5 | | 12 | 1998 | | 18(2):185-196 | 25-Jan-02 |

**TOTAL ALL ITEMS: 51**           **TOTAL JRNLS:  9**           **TOTAL PAGES:  336**

as well as on the Form, itself (most QuickDOC Reports will do this as well).

## New items (E-Jrnls, payments) in Compute Totals (Borrowing) Report

The first page of Compute Totals (Borrowing) now also gives the percentage of items on each Source that were delivered electronically, as well as a subtotal within each Source if any of those items were monographs or audio-visuals.  The Type totals now also includes **E-Jrnls**, as well as Jrnls, Monographs, and AV items.

The first page of Compute Totals (Borrowing) also now shows a report of the methods of **Payments to Lenders** for the period, along with **total charges** allocated to each **payment type**, with categories for **EFTS**, **IFM**. **Invoice/Other, Not Yet Paid** and **Free**  The new parts of the Compute Totals (Borrowing) Report are:

| TOTAL Physical & Electronic FILLS: | | Physical 109 | E-Journals included by type | Electronic 56 | | 165 | |
|---|---|---|---|---|---|---|---|
| % of Totals: | | 66.06% | | 33.94% | | | |

| By Type: | Jrnls: 161 | E-Jrnls: 1 | Monographs: 3 | AV: | Originals: | Copies: 165 | Rush: |
|---|---|---|---|---|---|---|---|
| % of Totals: | 97.58% | 0.61% | 1.82% | | | 100.00% | |

| TOTAL ITEMS: | Rec'd 165 | Unsuccessful 21 | Outstanding 9 | Grand Total 195 |
|---|---|---|---|---|
| % of Totals: | 84.62% | 10.77% | 4.62% | |

| PAYMENTS Items Paid Via: | | EFTS 43 | IFM | Invoice/Other 17 | Not Yet Paid 32 | Free 73 |
|---|---|---|---|---|---|---|
| Est $ By Method: | | $480.00 | | $158.00 | $327.00 | $0.00 |
| % of Rec'd Items: | | 26.06% | | 10.30% | 19.39% | 44.24% |
| TOTAL Cost: | $965.00 | | | Avg Cost/Item: $5.85 | | |

# New Patron Status Report

The **Patron Status Report** provides a quick snapshot of Borrowing activity by the Status of the Patron. It also tracks the **Local Delivery Method** used to convey the item to the Patron, and computes an **Average Turnaround Time** for items by **Patron Status Code**.

This report appears at the top of Page 2 in the Compute Totals (Borrowing) Report:

13-Feb-2003        Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Dec-02)        Page 2

Patron Status Report (using Local Delivery to Patron Methods)

| Patron Status | TOTAL ITEMS | Status % Total | Physical Delivery: Mail | PkUp | Msgr | Inter-office | FedEx | Other | Electronic Delivery: Email(pdf) | (tiff) | Fax | Web (pdf) | (tiff) | Turnaround Avg # Days |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| No Status Assigned | 87 | 52.73% | | 84 | 1 | | | 1 | | | | | 1 | 5.7 |
| AHP | | | | | | | | | | | | | | |
| DD | | | | | | | | | | | | | | |
| FAC | | | | | | | | | | | | | | |
| FELLOW | 10 | 6.06% | | 9 | | 1 | | | | | | | | 6. |
| FLAG | | | | | | | | | | | | | | |
| GRAD | | | | | | | | | | | | | | |
| MD | 62 | 37.58% | 1 | 48 | | | | | 5 | 2 | 1 | 4 | 1 | 4.1 |
| NURS | 6 | 3.64% | | 5 | | | | | | | | | 1 | 6.8 |
| OTH | | | | | | | | | | | | | | |
| RES | | | | | | | | | | | | | | |
| STAFF | | | | | | | | | | | | | | |
| UND | | | | | | | | | | | | | | |

The Status, Suffix and Purpose Reports track the LOCAL Delivery Method---how it got to the patron.

# New Patron Suffix Report

Also on Page 2 of Compute Totals (Borrowing) is the **Patron Suffix Report**, which provides a snapshot of Borrowing activity by the type of Patron as revealed in the suffix (M.D., D.D.S., M.L.S., etc). It also tracks the **Local Delivery Method** used to convey the item to the Patron, by Suffix value, during the period specified, and computes an **Average Turnaround Time** for items by **Patron Suffix Value**:

**Patron Suffix Report  (using Local Delivery to Patron Methods)**

| Patron Suffix | TOTAL ITEMS | Suffix % Total | Physical Delivery: | | | Inter-office | FedEx | Other | Electronic Delivery: | | | | | Turnaround Avg # Days |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | Mail | PkUp | Msgr | | | | Email(pdf) | (tiff) | Fax | Web (pdf) | (tiff) | |
| No Suffix | 87 | 52.73% | | 84 | | 1 | | 1 | | | | | 1 | 5.7 |
| D.D.S. | | | | | | | | | | | | | | |
| D.M.D. | | | | | | | | | | | | | | |
| DNSC | | | | | | | | | | | | | | |
| L.P.N. | | | | | | | | | | | | | | |
| LiCSW | 4 | 2.42% | | 3 | | | | | | | | | 1 | 6.8 |
| M.D. | 54 | 32.73% | 1 | 41 | | | | | 5 | 1 | 1 | 4 | 1 | 4.5 |
| M.L.S. | | | | | | | | | | | | | | |
| M.S. | | | | | | | | | | | | | | |
| M.S.L.S. | | | | | | | | | | | | | | |
| M.S.W. | | | | | | | | | | | | | | |
| Ph.D. | 18 | 10.91% | | 16 | | 1 | | | | 1 | | | | 4.2 |
| Pharm.D. | | | | | | | | | | | | | | |
| R.D. | | | | | | | | | | | | | | |
| R.N. | 2 | 1.21% | | 2 | | | | | | | | | | 7. |
| R.Ph. | | | | | | | | | | | | | | |
| R.R.T. | | | | | | | | | | | | | | |

> The Status, Suffix and Purpose Reports track the LOCAL Delivery Method---how it got to the patron.

# New Purpose of Request Report

After the Patron Suffix Report on Page 2 of Compute Totals (Borrowing) is the **Purpose of Request Report**, which provides a snapshot of Borrowing activity by the purpose of request: Education, Grant-funded research, Other, Patient Care or Research.  It also tracks the **Local Delivery Method** used to convey the item to the Patron, by purpose, during the period specified, and computes the **Average Turnaround Time** for items by **Purpose Code**.  The Totals row at the bottom of this page reflects the Local Delivery Method Totals for the period specified.

**Purpose of Request Report  (using Local Delivery to Patron Methods)**

| Patron Purpose | TOTAL ITEMS | Purpose % Total | Physical Delivery: | | | Inter-office | FedEx | Other | Electronic Delivery: | | | | | Turnaround Avg # Days |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | Mail | PkUp | Msgr | | | | Email(pdf) | (tiff) | Fax | Web (pdf) | (tiff) | |
| No Purpose | 161 | 97.58% | 1 | 146 | | | 1 | | 5 | 1 | 1 | 4 | 2 | 5.2 |
| EDU | | | | | | | | | | | | | | |
| GRA | 2 | 1.21% | | | | 1 | | | | 1 | | | | 3. |
| OTH | | | | | | | | | | | | | | |
| PC | | | | | | | | | | | | | | |
| RES | 2 | 1.21% | | | 1 | | | | | | | | 1 | 2.5 |
| **Totals:** | **165** | | 1 | 146 | 1 | 1 | 1 | | 5 | 2 | 1 | 4 | 3 | |
| **% of Totals:** | | | 0.61% | 88.48% | 0.61% | 0.61% | 0.61% | | 3.03% | 1.21% | 0.61% | 2.42% | 1.82% | |

> The Purpose Report tracks activity by purpose of request.  Not much used at present, above.  Also gives local del meth totals.

# New Library Group Report - By Del Method  (Borrowing)

The **Library Group Report – By Delivery Method (Borrowing)** is found at the top of the **third page (or later) of the Compute Totals (Borrowing) Report**.  It provides a breakdown of activity on the Borrow side **by Library Group** of the Lending Library.  Since a single Library may belong to more than one Group, the Totals here may not match the total number of borrowed items for the period.  The report breaks activity down by **Delivery Method** and gives the percentage of items filled for each Library Group that were delivered electronically,  the percentage of activity with each Library Group within all Groups, and the average turnaround time by Library Group.

**Library Group Report – By Del Method (Borrowing)**

| Library Group | TOTAL ITEMS | Group % Total | Physical Delivery: Mail | PickUp | (Mono/ Other A/V) | Web | Electronic Delivery: Ariel | Email | Fax | % Elect | Item Sent To: Library | Patron | Turnaround Avg # Days |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| OUT$ | 28 | 12.90% | 18 | | (2) | | | 7 | 3 | 36% | 28 | | 5.8 |
| OUT | | | | | | | | | | | | | |
| CELLS | 31 | 14.29% | 22 | | | | 1 | 3 | 5 | 29% | 31 | | 4.2 |
| MA | 59 | 27.19% | 30 | | | | | 12 | 17 | 49% | 59 | | 2.3 |
| R8$ | 24 | 11.06% | 18 | | | | | 4 | 2 | 25% | 24 | | 6.3 |
| R1$ | 19 | 8.76% | 17 | | (1) | | | 2 | | 11% | 19 | | 7.9 |
| R8 | 7 | 3.23% | 6 | | | | 1 | | | 14% | 7 | | 7.4 |
| MA$ | 7 | 3.23% | 7 | | | | | | | | 7 | | 8.6 |
| BBLC | 21 | 9.68% | 8 | | | | | 9 | 4 | 62% | 21 | | 2.2 |
| BBLFAX | 15 | 6.91% | 7 | | | | | | 8 | 53% | 15 | | .9 |
| NLM | | | | | | | | | | | | | |
| R1 | 2 | 0.92% | 2 | | | | | | | | 2 | | 9.5 |
| MASSFAX | 4 | 1.84% | 1 | | | | | 2 | 1 | 75% | 4 | | .3 |
| **Total in Groups:** | **217** | | 136 | | | | 2 | 39 | 40 | | 217 | | |
| **% of Totals:** | | | 62.67% | | | | 0.92% | 17.97% | 18.43% | | | | |

[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]

[There were 168 Items not filled in-house (i.e., not by MAUBET). 22 of these were filled by Lenders with no assigned Library Group.]

If there are loans to Libraries that have not been assigned to a Library Group, the number of those items is listed at the end of the report.

## New Library Group Report - By Source  (Borrowing)

The **Library Group Report – By Source (Borrowing)** is found at the bottom of the **third page (or later) of the Compute Totals (Borrowing) Report**.  It provides a breakdown of activity on the Borrow side **by Source and Library Group** of the Lending Library.  Since a single Library may belong to more than one Group, the Totals here may not match the total number of borrowed items for the period.  The report breaks Group activity out by Source used, including: DOCLINE, LOANSOME DOC, OCLC, RLIN, Phone, Fax, Mail and Other.  **Item payment methods** (broken out by EFTS, IFM and non-Electronic methods---typically, Invoices, Coupons,  Deposit Accounts, Credits, etc.) are also listed by Group.

**Library Group Report - By Source (Borrowing)**

| Library Group | TOTAL ITEMS | Source: DOCLINE | LDOC | OCLC | RLIN | Phone | Fax | Mail | Other | Item Payment Via: EFTS | IFM | Other |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| OUT$ | 28 | 21 | 5 | | 1 | | | | 1 | 6 | | 13 |
| OUT | | | | | | | | | | | | |
| CELLS | 31 | 28 | 2 | 1 | | | | | | | | |
| MA | 59 | 52 | 3 | 1 | | 1 | 1 | | 1 | | | |
| R8$ | 24 | 20 | 4 | | | | | | | 15 | | |
| R1$ | 19 | 19 | | | | | | | | 16 | | |
| R8 | 7 | 7 | | | | | | | | | | |
| MA$ | 7 | 7 | | | | | | | | 2 | | |
| BBLC | 21 | 18 | 1 | | | 1 | 1 | | | | | |
| BBLFAX | 15 | 14 | | | | | | | 1 | | | |
| NLM | 17 | 13 | 3 | | | | | | 1 | | | 12 |
| R1 | 2 | 2 | | | | | | | | | | |
| MASSFAX | 4 | 3 | 1 | | | | | | | | | |
| **Total in Groups:** | **234** | 204 | 19 | 2 | 1 | 2 | 2 | | 4 | 39 | | 25 |
| **% of Groups Totals:** | | 87.18% | 8.12% | 0.85% | 0.43% | 0.85% | 0.85% | | 1.71% | 16.67% | | 10.68% |

[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]

## New List of Patron (or Dept) Invoices Outstanding Report

The Local Billing Menu Bar choice now also includes a choice for a Report of **Patron Invoices Outstanding** and **Dept Invoices Outstanding** (which includes Cost Center Reports):
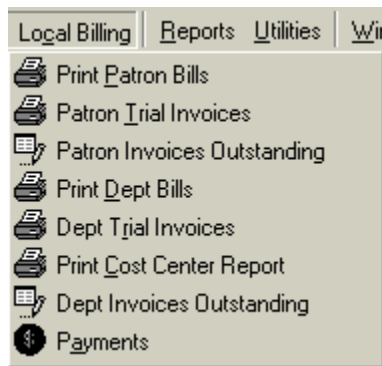
Lists of Invoices Outstanding include all invoices generated during the period specified that have not been paid, or have received only partial payment.  The Patron List has the following format:



The Dept and Cost Center List is the same, but without the Patron Last Name, since the Dept Abbreviation is embedded in the Invoice Number itself:



This list can be used to reprint a second notice for selected invoices.  A more automated process for generating second notices is still planned for some time in the future.

## *Quick Print from any Print Preview screen*

### Print Page button added to the Print Preview menu

A Print Page button has been added to the Print Preview menu, mostly for use in the Quick Journal Report display, but it will be enabled on most Print Preview screens during regular Print Preview displays. In most cases, though, since this Print button will only fetch the top half of the screen, it will be best to print out the complete report using the normal print selection. If, however, the brief section of a report that you most want happens to be located in the top one-third to one-half of the display page, you can also use the **Print Page [Top half only]** button to get a quick printout.



The printout will show just the part of the page displayed. Please note that, although you can use the vertical scroll bar at the right of the Print Preview screen to scroll down, the printout itself will always begin at the top and, consequently, give you the top half only (hence the name of the button).

## *Lend Reports*

### Detailed Lend Report now includes List of Library Groups

The first line of each Library's activity includes a **list of the Library Groups** to which that Library belongs. The format is as follows:

## Detailed Lend Report (by Library)
01-Jul-00 to 31-Oct-00

| 27-Dec-2000 | | | Beth Israel Deaconess Medical Center (01-Jul-00 to 31-Oct-00) | | | Page 1 |
|---|---|---|---|---|---|---|
| Item | Borrower | ReqNo | Date | Title | Citation | Charge |
| | CTUUCC is a member of Library Group: R8$ | | | | | |
| 1 | CTUUCC | 622683 | 15-Sep-00 | 1998 Am J of physiology. | 274():F541-F549 | $0.00 |
| Total 1 Items For Union Carbide Corporation | | | | | Total Charges For CTUUCC: | $0.00 |
| | MAUAJH is a member of Library Groups: MA, MASSFAX | | | | | |
| 1 | MAUAJH | 26620 | 21-Jul-00 | 1997 J int medical research. | May-Jun;25(3):155-8 | $0.00 |
| Total 1 Items For Anna Jaques Hospital | | | | | Total Charges For MAUAJH: | $0.00 |
| | MAUBKM is a member of no Library Groups | | | | | |
| 1 | MAUBKM | 359447 | 23-Aug-00 | 2000 J applied physiology (Bethesda, Md. | Aug;89(2):711-720 | $0.00 |
| Total 1 Items For BERKSHIRE MEDICAL CENTER | | | | | Total Charges For MAUBKM: | $0.00 |
| | MAUBSM is a member of Library Group: MA | | | | | |
| 1 | MAUBSM | 10944 | 18-Jul-00 | 2000 Research in nursing & health. | Jun;23(3):204-12 | $3.00 |
| 2 | MAUBSM | 365461 | 23-Aug-00 | 1999 Pediatrics (Online) | Jan;103(1 Suppl E):374-83 | $3.00 |
| Total 2 Items For Holy Family Hospital and Medical Center | | | | | Total Charges For MAUBSM: | $6.00 |

## Summary Lend Report now includes Library Groups

The Summary Lend Report now includes Library Group assignments in parentheses, if any groups are assigned to that library:

## Summary Lend Report (by Library)
01-Sep-02 to 31-Dec-02

| 7-Jan-2003 | | Beth Israel Deaconess Medical Center (01-Sep-02 to 31-Dec-02) | | | Page 1 |
|---|---|---|---|---|---|
| Library No. | Borrower LIBID | | Items Loaned | Charge | Lib # |
| 1 | MAUBKM | BERKSHIRE MEDICAL CENTER (CELLS, MA) | 1 | $0.00 | 1 |
| 2 | MAUBVB | Va Med Ctr Brockton/Med Library Il (BBLC, MA) | 1 | $0.00 | 2 |
| 3 | MAUDAV | ABIOMED Incorported (CELLS, MA) | 1 | $0.00 | 3 |
| 4 | MAUERI | Eye Research Institute (CELLS, MA) | 1 | $0.00 | 4 |
| 5 | MAUHCM | Children's Hospital (BBLC, MA) | 1 | $0.00 | 5 |
| 6 | MAUHSL | St Lukes Hospital (CELLS, MA) | 2 | $0.00 | 6 |
| 7 | MAUHYA | CAPE COD HOSPITAL (CELLS, MA, MASSFAX) | 1 | $0.00 | 7 |
| 8 | MAULCB | LAHEY CLINIC (BBLC, MA) | 1 | $0.00 | 8 |
| 9 | MAUMAH | Mount Auburn Hospital (BBLC, MA) | 1 | $0.00 | 9 |
| 10 | MAUMHC | MetroWest Medical Center (BBLFAX, MA) | 6 | $0.00 | 10 |
| 11 | MAUMLW | Mary Lane Hospital (CELLS, MA) | 1 | $3.00 | 11 |
| 12 | MAUMRD | SPAULDING REHABILITATION HOSPITAL (MA$) | 2 | $6.00 | 12 |
| 13 | MAUNBP | New England Baptist Hospital (BBLC, MA) | 1 | $0.00 | 13 |
| 14 | MAUNEO | NEW ENGLAND COLLEGE OF OPTOMETRY (BBLC, MA) | 4 | $0.00 | 14 |
| 15 | MAUSEF | St. Elizabeth's Medical Center (BBLFAX, MA) | 2 | $0.00 | 15 |
| 16 | MAUTUV | Tufts Univ Veterinary School/Libra (CELLS, MA) | 2 | $0.00 | 16 |
| 17 | MAUVBD | EDITH N ROGERS MEMORIAL VA HOSPITAL (MA$) | 2 | $6.00 | 17 |
| 18 | MAUZSL | Dana-Farber Cancer Institute (BBLFAX, MA) | 6 | $0.00 | 18 |
| 19 | MEUMAN | MAINE MEDICAL CENTER (R8$) | 1 | $11.00 | 19 |
| 20 | NHUPNH | PORTSMOUTH REGIONAL HOSPITAL (CELLS, R8) | 1 | $0.00 | 20 |
| TOTAL LIBRARIES: 20 | | TOTAL ITEMS: 38 | | TOTAL CHARGES: | $26.00 |

## New items (E-Jrnls, payments) in Compute Totals (Lending) Report

The first page of Compute Totals (Lending) now also gives the percentage of items on each Source that were delivered electronically, as well as a subtotal within each Source if any of those items were monographs or audio-visuals.

Type of Loan now also includes **E-Journal**, as well as Journal, Monograph and AV. A typical first page would look like this:

## Compute Totals (Lending)
### 01-Jan-02 to 31-Dec-02

> This column tracks the % from each Source that was delivered electronically.

| 16-Jan-2003 | | | Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Dec-02) | | | | | | | | Page 1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Item | TOTAL | Source | Physical Delivery: (Mono/ | | | | Electronic Delivery: | | % | (Item Sent To:) | |
| Source | ITEMS | % Total | Mail | PickUp | Other A/V) | Web | Ariel | Email | Fax Elect | Library | Patron |
| DOCLINE | 142 | 99.30% | 49 | | | | | | 93  65% | 142 | |
| OCLC | | | | | | | | | | | |
| RLIN | | | | | | | | | | | |
| Mail | | | | | | | | | | | |
| Telephone | | | | | | | | | | | |
| Fax | | | | | | | | | | | |
| Other | 1 | 0.70% | 1 | | (1) | | | | | 1 | |

> (Monograph and AV subtotals for each line appear here.)

> Tracking by Item Sent To is not yet available in 2.1.x

| | | | | | | |
|---|---|---|---|---|---|---|
| TOTAL FILLED: | 143 | | 50 | | 93 | 143 |
| % of Totals: | | | 34.97% | | 65.03% | |

| | Physical | Electronic | |
|---|---|---|---|
| TOTAL Physical & Electronic FILLS: | 50 | 93 | 143 |
| % of Totals: | 34.97% | 65.03% | |

Breakout by Type includes E-Journals

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| By Type: | Jrnls: 141 | E-Jrnls: 1 | Monographs: 1 | AV: | Originals: | Copies: 143 | Rush: |
| % of Totals: | 98.60% | 0.70% | 0.70% | | | 100.00% | |

| TOTAL ITEMS: | Filled | Rejected | In Process | Grand Total |
|---|---|---|---|---|
| | 143 | 42 | 1 | 186 |
| % of Totals: | 76.88% | 22.58% | 0.54% | |

The first page of Compute Totals (Lending) also now shows a report of the methods of **Billing information** for the period, and amounts billed (or to be billed), with categories for **EFTS**, **IFM**. **Invoice, Deposit Acct, Other, Not Yet Billed** and **Free**.

| BILLING. Items Billed Via: | EFTS | IFM | Invoice | Deposit Acct | Other | Not Yet Billed | Free |
|---|---|---|---|---|---|---|---|
| | 17 | 2 | 1 | | 1 | 1 | 120 |
| Est. $ By Method: | $51.00 | $14.00 | $11.00 | | $3.00 | $3.00 | $0.00 |
| % of Filled Items: | 11.97% | 1.41% | 0.70% | | 0.70% | 0.70% | 84.51% |
| TOTAL Charged: $82.00 | | | | | Avg Chrg/Item: $0.58 | | |

This can be a quick way to check the amounts you receive (or should receive) from various Billing methods.

## New Library Group Report - By Del Method  (Lending)

The **Library Group Report – By Delivery Method (Lending)** is found on the **second page of the Compute Totals (Lending)** Report, at the top.  It provides a breakdown of activity on the Lend side **by Library Group** of the Borrowing Library.  Since a single Library may belong to more than one Group, the Totals here may not match the total number of loaned items for the period.  The report breaks activity down by **Delivery Method** and gives the percentage of items filled for each Library Group that were delivered electronically, as well as the percentage of activity with each Library Group within all Groups.

Library Group Report – By Del Method (Lending)

| Library Group | TOTAL ITEMS | Group % Total | Physical Delivery: (Mono/ | | | | | Electronic Delivery: | | | % | Item Sent To: | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | Mail | PickUp | Other | A/V) | Web | Ariel | Email | Fax | Elect | Library | Patron |
| OUT$ | | | | | | | | | | | | | |
| OUT | | | | | | | | | | | | | |
| CELLS | 44 | 17.32% | 30 | | | (1) | | | | 14 | 32% | 44 | |
| MA | 106 | 41.73% | 28 | | | | | | | 78 | 74% | 106 | |
| R8$ | 1 | 0.39% | 1 | | | | | | | | | 1 | |
| R1$ | | | | | | | | | | | | | |
| R8 | 9 | 3.54% | 8 | | | (1) | | | | 1 | 11% | 9 | |
| MA$ | 18 | 7.09% | 13 | | | | | | | 5 | 28% | 18 | |
| BBLC | 33 | 12.99% | 3 | | | ↑ | | | | 30 | 91% | 33 | |
| BBLFAX | 36 | 14.17% | 3 | | | | | | | 33 | 92% | 36 | |
| NLM | | | | | | | | | | | | | |
| R1 | | | | | | | | | | | | | |
| MASSFAX | 7 | 2.76% | 1 | | | | | | | 6 | 86% | 7 | |

These are the numbers of Total Items that were monograph or A-V

| | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total in Groups: | 254 | | 87 | | | | | | | 167 | | 254 | |
| % of Totals: | | | 34.25% | | | | | | | 65.75% | | | |

[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]

[There were also 9 items loaned to Libraries with no assigned Library Group.]

If there are loans to Libraries that have not been assigned to a Library Group, the number of those items is listed at the end of the report.

# New Library Group Report - By Source  (Lending)

The **Library Group Report – By Source (Lending)** is found at the bottom of the **second page (or later) of the Compute Totals (Lending) Report**.  It provides a breakdown of activity on the Lend side **by Source and Library Group** of the Borrowing Library.  Since a single Library may belong to more than one Group, the Totals here may not match the total number of loaned items for the period.  The report breaks Group activity out by Source used, including: DOCLINE, OCLC, RLIN, Phone, Fax, Mail and Other.  **Item payment methods** (broken out by EFTS, IFM and non-Electronic methods---typically, Invoices, Coupons,  Deposit Accounts, Credits, etc.) are also listed by Group.

Library Group Report - By Source (Lending)

| Library Group | TOTAL ITEMS | Source: DOCLINE | OCLC | RLIN | Phone | Fax | Mail | Other | Item Payment Via: EFTS | IFM | Other |
|---|---|---|---|---|---|---|---|---|---|---|---|
| OUT$ | | | | | | | | | | | |
| OUT | | | | | | | | | | | |
| CELLS | 44 | 43 | | | | | | 1 | 1 | | |
| MA | 106 | 106 | | | | | | | 3 | 2 | |
| R8$ | 1 | 1 | | | | | | | | 1 | |
| R1$ | | | | | | | | | | | |
| R8 | 9 | 8 | | | | | | 1 | | | |
| MA$ | 18 | 18 | | | | | | | 14 | 2 | 1 |
| BBLC | 33 | 33 | | | | | | | | | |
| BBLFAX | 36 | 36 | | | | | | | | 2 | |
| NLM | | | | | | | | | | | |
| R1 | | | | | | | | | | | |
| MASSFAX | 7 | 7 | | | | | | | | | |

'Other' payments include Invoices, Dep Accts, etc.

| | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Total in Groups: | 254 | 252 | | | | | | 2 | 18 | 7 | 1 |
| % of Groups Totals: | | 99.21% | | | | | | 0.79% | 7.09% | 2.76% | 0.39% |

[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]

# New List of Library Invoices Outstanding Report

The Billing, EFTS Menu Bar choice now also includes a Report of Library Invoices Outstanding:
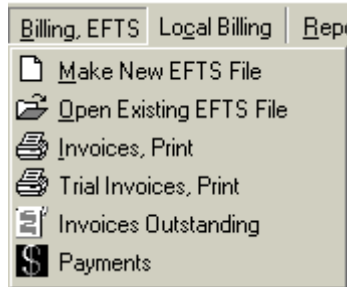
The List of Invoices Outstanding Report includes all invoices generated during the period specified that have not been paid, or have received only partial payment.



This list can be used to reprint a second notice for selected invoices. A more automated process for generating second notices is still planned for some time in the future.


## *Database Changes*

### tblHoldings Table adds six new fields

Six new fields will be added to the tblHoldings Table upon first starting up after version 2.1.1 is installed. (Because upgrades often also include such changes to the QuickDOC.MDB database, itself, it's worth mentioning again that **NO OTHER MACHINE SHOULD BE RUNNING QuickDOC DURING AN UPGRADE INSTALLATION, OR DURING THE FIRST TIME THE NEW UPDATE IS RUN**.

The Holdings Table isn't much used ay present, but will be in the future to permit automated lookups for Journal Holdings during certain operations. Newly-added fields are:

> **HoldingOnlineStart**
> **HoldingOnlineEnd**
> **HoldingOnlineVendor**
> **HoldingOnlineURL**
> **HoldingOnlineElectDelivILL**
> **HoldingOnlineElectDelivPatron**

All of these are text fields, with lengths from 4 (Start and End are years) to 120 (URL is a text field, although it will contain a URL).


## JetComp.exe Database Compact & Repair utility

The JetComp.exe database Compact and Repair Utility is now to be found in the Program location folder of each Installation. JetComp.exe is a standalone utility that allows you to compact the QuickDOC.MDB database, and to repair any errors found in the database during the survey. Detailed instructions for running this utility are found under **Compact & Repair Database** in the **QuickDOC Help Index**.

Compact should be run on a regular basis because it creates a new database with the data and tables in contiguous and sorted order.  It also refreshes the statistics in the database and causes all stored queries to recompile.  Ultimately, this reduces the size of the database and can significantly increase performance.